

# REPORT TO THE CITY COUNCIL Checklist

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## **Prior to Drafting a Report to the City Council:**

### **SUBJECT**

- ☐ Subject line should be concise and short
- ☐ Subject line format is in sentence structure (not solid caps) with no period at the end
- ☐ Subject line literally is what will be used as the title on the Council Agenda
- ☐ Subject line leads with an action word "Amend," "Adopt," "Approve," or "Award"
- ☐ Dollar amount of proposed action must be included
- ☐ Multi-year contracts should be stated at their full contract amount
- ☐ Include City Council District (Council District 2)
- ☐ Include Bid Number (Bid File 1234)

### **PLANNING**

- ☐ Select a target Council date approximately 60 days from current date.
- ☐ Determine if there is a Bid Evaluation needed? - Consult Purchasing
- ☐ Is there documentation review such as an agreement? – Consult City Attorney
- ☐ Is there an Annual Appropriation Resolution (AAR) needed? - Consult Budget
- ☐ Is there a Master Fee Schedule (MFS) needed? - Consult Budget
- ☐ Is there a Personnel Appropriation Resolution (PAR) needed? - Consult Personnel Services
- ☐ Submit the title into the computer system

## **After Drafting a Report to the City Council:**

### **VERIFICATION**

- ☐ Proofread and edit the entire Report to the City Council
- ☐ Proofread all attachments
- ☐ Verify there are no spelling or grammatical errors
- ☐ Verify all numbers throughout the document match and total correctly

### **FORMAT INFORMATION**

- ☐ Verify font style/size is Arial 12
- ☐ Verify alignment is full justification
- ☐ Verify margins align and borderline runs down side
- ☐ Verify section headings are bold, not underlined, and should not include a colon or semi-colon
- ☐ Verify acronyms - spell out first instance (Regional Wastewater Reclamation Facility) and then use an acronym with each subsequent instance (RWRF)
- ☐ Yes ☐ No Length of report – can it be shortened?
- ☐ Check breaks at end of page
- ☐ Check breaks at end of lines

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## BY

- ☐ Verify correct spelling and format:
- ☐ Verify professional credential is included (if applicable)

## RECOMMENDATION/S

- ☐ If more than one (1) recommendation, then pluralize to the heading by adding an s

## EXECUTIVE SUMMARY

- ☐ Should be brief, no more than one paragraph
- ☐ Use critical facts only
- ☐ Information stated here, must be expanded in the Background section
- ☐ Is the action being requested of Council clear and concise so that anyone understands?

## BACKGROUND

- ☐ Include any prior history associated to the issue
- ☐ Include statement, "City Attorney has reviewed and approved to form." (if applicable)
- ☐ Include the source of funding
- ☐ Include appropriate regulation summary information

## ENVIRONMENTAL FINDING

- ☐ Include the CEQA findings

## LOCAL PREFERENCE

- ☐ N/A due to State and Federal money
- ☐ N/A because it is more than ½ of 1%
- ☐ Yes – state why

## FISCAL IMPACT

- ☐ Funding Source (clarify if General Fund is or is not impacted)
- ☐ Appropriation Authority
- ☐ Yes ☐ No Is there an Annual Appropriation Resolution (AAR)?
- ☐ Has the AAR already been budgeted?
- ☐ If appropriate explain impact on other projects or timing of funding from other agencies
- ☐ Future obligations (e.g. lease will continue for 3 years at an annual cost of \$50,000)

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## HEADER

- ☐ Header has four lines in the following order and typeset:  
REPORT TO THE CITY COUNCIL  
Abbreviated Subject Title  
March 13, 2014 (Date of Meeting)  
Page 2 (Number)
- ☐ Verify the header on all pages matches the information on the cover sheet  
(Council meeting date and title)

## ATTACHMENT/S

- ☐ Yes ☐ No Is there a Fiscal Impact Statement?
- ☐ Yes ☐ No Is there a Bid Evaluation? (Has the Bid Evaluation been signed and a copy returned?)
- ☐ Yes ☐ No Is there an Annual Appropriation Resolution (AAR)?
- ☐ Yes ☐ No Is there a Position Authorization Resolution (PAR)?
- ☐ Yes ☐ No Is there a Master Fee Schedule (MFS)?
- ☐ Verify on the last page of the Report to the City Council, bottom left corner states  
"Attachment:" then list the same
- ☐ If there is more than one attachment, then add an "s" to the reference notation
- ☐ Verify the authorized authority is the same on attachments as on the Report to the City  
Council
- ☐ Yes ☐ No Are the attachments included with the Report to the City Council?

## REVIEW

- ☐ Reviewed by the staff writer
- ☐ Reviewed by the associated departments (Purchasing, City Attorney, etc.)
- ☐ Reviewed by the supervisor
- ☐ Reviewed by the Division Manager

## FINALIZE

- ☐ Attachments to Report to the City Council have the required signatures?
- ☐ Read entire Report to the City Council including attachments (final proof)
- ☐ Signed by Division Manager?
- ☐ Save document to L:\Council Reports\Division?
- ☐ Hard copy made for Division?
- ☐ Signed off by Department Administration
- ☐ Original delivered to City Manager's Office

*This document has been adapted from a document created by Kevin Norgaard.*